



# State of Michigan

## Records Management Services



### eSignature Solution

#### Tip Sheet: Document Layouts

Layouts can save a sender time when adding fields to future documents. A layout remembers and saves the placement of signer fields on the current document, so they can be applied to other documents that use the same fields. For example, if a form will always be signed by the same recipients (either named people or placeholders), then layouts can be used to apply the signing fields automatically, instead of manually each time. Layouts can be used in combination with templates. The template can be used to save the list of recipients, and the layout can be used to save the location of the signer fields.

In the Designer Window, add all necessary signer fields and other fields to the document. Ensure that they are in the correct location, are sized appropriately, and any settings are configured. Only add those fields that will always be used when the layout is applied to future documents. If a field is unique to only one document, do not add it before saving the layout.

There are four buttons in the top right-hand corner of the window: Settings, Save Layout, Apply Layout and Document Visibility. Click on “Save Layout” to save the document layout.



Next, name the new layout. A recommended naming convention for layouts would include the document type plus the word “layout.” For example, Statement of Work Layout. If this layout could be used by other people who are in the same sub-account, toggle on the share layout button.

The saved layout can be used on any future transaction. In the Designer Window, click the “Apply Layout” button, and the fields will be added to the document. Adjust them, if necessary.

